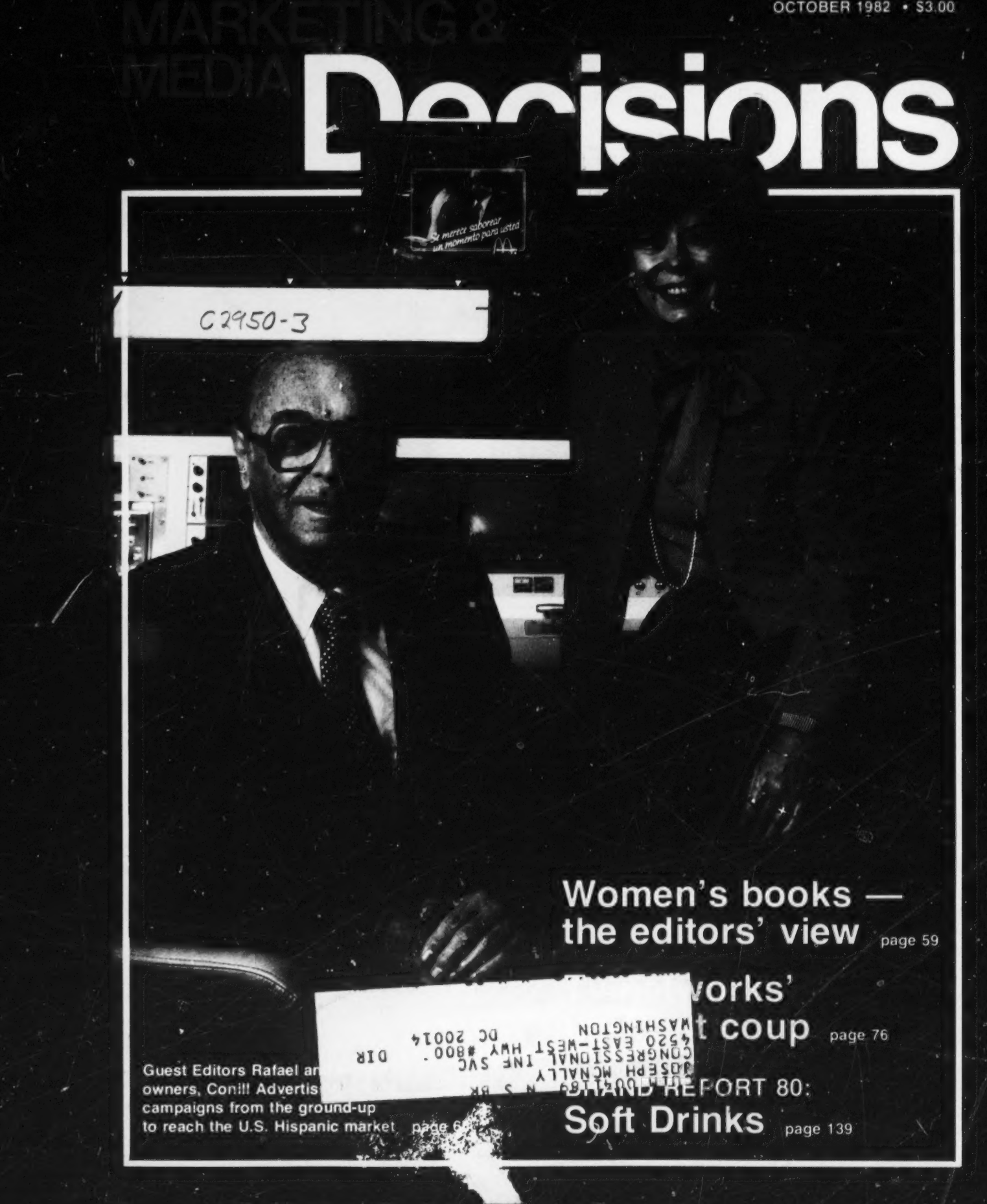
OCTOBER 1982 • $3.00

# MARKETING & MEDIA Decisions

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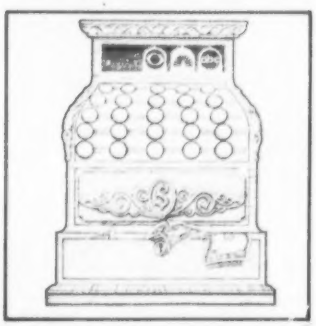

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# FUTURES

## Pay cable, videotex potential touted

A decline in the growth of cable penetration, and expansion in pay-cable and videotex are predicted in a pair of reports on probable growth in the industry.

Cable penetration will decline in the rest of the 1980s, according to a study by International Resource Development, Norwalk, Conn. The IRD study, Video Market Opportunities, estimates that by 1992, only 69 million U.S. homes will be passed by cable, much lower than the previous concensus figure of 90 million. Penetration is pegged at 34 million.

Factors mitigating against cable growth, the study indicates, are the ever-increasing costs of constructing cable franchises, the political struggles necessary to win new franchises, and growing competition from direct broadcast satellite service and subscription tv.

But the IRD study suggests two emerging profitable areas, pay-cable and teletex. By 1992, 4.5 million subscribers will be spending $2.2 billion annually on cable-based teletex, the report estimates.

As a consequence of growth in satellite and cable, the study predicts the networks "will improve their offerings" with new movies and special sports events.

Opinion Research Corporation, in Princeton, N.J., came to similar conclusions, indicating that pay tv's growth will outstrip that of cable.

In conducting the research, Howard Horowitz, vp and project manager, observed that "instead of being more satisfied with all sorts of alternative programing, the public actually demands more options, more news, more weather, more sports, more culture, more children's programing, and more local shows."

**Total U.S. Cable Television Industry Services Market, 1982 - 1992**

**($ Million)**

| | 1982 | 1984 | 1987 | 1992 |
|---|---|---|---|---|
| Total U.S. Cable Television Service Revenues | 4,153 | 5,464 | 7,360 | 10,310 |
| Basic Service | 2,250 | 2,520 | 2,790 | 3,060 |
| Advertising Over Basic Service (including cabletext) | 250 | 400 | 625 | 1,000 |
| Pay Cable Service | 1,650 | 2,260 | 1,870 | 1,320 |
| Cable Pay-Per-View | 1 | 160 | 310 | 1,620 |
| Cable Videotex Residential Svc. (Non-Entertainment) | 1 | 115 | 1,125 | 2,250 |
| Cable Telecommunications | 1 | 9 | 140 | 1,060 |

(SOURCE: INTERNATIONAL RESOURCE DEVELOPMENT INC.)

Last year, he said, 12% of ORC's sample said they would "most likely" convert to cable within the next two months. The new survey brings that total up to 16%.

The report shows that the most significant growth has not been in cable but in pay cable tv. In the last year, pay cable subscription has increased at about three times the rate of growth in basic service.

ORC's report says this is bad news for advertisers. In the first study of the cable market, ORC found that 45% of respondents indicated a willingness to acccept advertising on pay-cable "under certain conditions" — specific time slots. After nine months, the percentage willing to accept advertising on pay-tv dropped to 35%. Meanwhile, the percentage of non-cable subscribers currently who would not subscribe to pay-cable if it carried ads increased from 52% to 60%.

The report concluded that if subscription intent is a meaningful guideline of potential growth, then the "dramatic expansion of pay and basic cable as evinced over the past year is not likely to subside."

## The older increase, but they feel younger

While the number of older people in the U.S. is increasing, many of them feel considerably younger than they are, recent research shows. Caldwell Davis Partners, New York, in a survey of over 1,000 men and women, found that two-thirds who have reached middle age feel five to 15 years younger than they are. The study also showed that the magnitude of difference between a person's chronological and perceived age increased as he or she grew older.

Franchellie Caldwell, president of the agency, explained, "Most people we surveyed said they felt 30 to 35 years old, regardless of their actual age. While there were some ex-

# Business may be off but salaries are up

**Simmy Sussman, marketing and ad agency executive placement specialist, finds the tight economy is pushing people costs to a new high. Here's her analysis of why — and a new run-down of salary ranges in marketing and media.**

In times like these it is important to assess what is happening in our business. Just today, the papers are full of surprises — Ford Motor Company is spending $8 million for 24 minutes of ABC's "The Winds of War."

One would think that in today's economy, one might take a conservative position. Not so — the madness continues — in media spending, in aggressive staffing. It is important to dissect our business and look at it today from every aspect.

### Agencies no longer grow own

There are two sides to the agency question — how do we attract media talent and how do we keep our departments staffed. I have always been a believer in developing your own talent. It has always amazed me to see agencies going to the outside at supervisory levels and above. Some agencies are not even investing in youngsters today, prefering to "let the other guy train them." There doesn't seem to be much of a paternalistic approach any more. Agencies are going to have

to take a position on this at some point.

It is getting impossible to find superior media talent, and as a result, media professionals can almost "write their own ticket" when special situations come up.

Moreover, the media business is obsessed with the "cult of personality" — the charisma of the special someone who can dazzle the client. Today the media business is almost like show business, where brains and personality can parlay someone to visibility and success beyond what anyone ever dreamed of a decade ago.

**Clients move in**

The most growth in the past few years seems to have occurred on the client side. Clients, being very careful of costs, have attempted and are doing more and more work in creating in-house facilities for their media operations. There have been an escalating number of trained media personnel going to the client side to oversee the work of the agencies.

As the facets of media are expanding in cable operations, new publication and new technology, corporations are using their own professionals working along with their agencies to get the most coverage, the most effeciency, the more innovative ideas. The agencies and other service organizations are under the gun to perform.

The buying services are another tremendous area for growth in a downward economy. Many agencies can not afford to staff properly to buy time for their clients most proficiently. The media buying services have a bigger opportunity to provide total media services for agencies that can not do it as well. Certainly, the small agencies, of which there are many, have the ability to buy better for clients when they can utilize the talents and "clout" that the services can add.

Also because of economic problems we are seeing many financial problems arising from media bills not being paid at stations and publications. It is imperative to know your customer. Certainly corporations are paying their bills, but slowly. The cash flow situation is disasterous. Everyone is acting as everyone else's banker, but the buck has to stop somewhere — where it belongs — as fast as possible.

Continued on page 136

# How salaries range in marketing and media

## Major 4A advertising agencies

**MEDIA**

| | |
|---|---|
| 1. Executive vp-director of marketing services | $70,000.—$125,000. |
| 2. Senior vp-media director | $50,000.—$100,000. |
| 3. Vp-director of local broadcast management | $40,000.—$ 70,000. |
| 4. Vp-associate media director | $32,000.—$ 65,000. |
| 5. Vp-assistant media director | $32,000.—$ 45,000. |
| 6. Assistant media director or media supervisor | $20,000.—$ 35,000. |
| 7. Buying supervisor | $25,000.—$ 35,000. |
| 8. Director out-of-home media | $25,000.—$ 40,000. |
| 9. Media-planner | $12,000.—$ 25,000. |
| 10. Media buyer | $12,000.—$ 25,000. |
| 11. Assistant media planner | $10,000.—$ 12,000. |

**MEDIA RESEARCH**

| | |
|---|---|
| 1. Senior vp-director | $50,000.—$ 75,000. |
| 2. Associate director of research information | $28,000.—$ 50,000. |
| 3. Media research supervisor | $22,000.—$ 30,000. |

**BROADCAST**

| | |
|---|---|
| 1. Sr. vp-associate director | $65,000.—$100,000. |
| 2. Vp-associate director | $45,000.—$ 70,000. |
| 3. Vp-program director | $32,500.—$ 60,000. |
| 4. Account executive | $25,000.—$ 40,000. |
| 5. Syndication specialist | $25,000.—$ 55,000. |
| 6. Broadcast assistant | $12,000.—$ 16,000. |
| 7. Staff assistant | $10,000.—$ 12,000. |

**COMPUTER APPLICATIONS (MEDIA)**

| | |
|---|---|
| 1. Director | $40,000.—$ 70,000. |
| 2. Program & systems supervisor | $25,000.—$ 40,000. |
| 3. Programer | $18,000.—$ 25,000. |

**Compensation package applicable to those at vp title and above**

| | |
|---|---|
| *Package includes:* Deferred compensation | $ 5,000. to $10,000. |
| Management bonus | $12,000. to $45,000. |
| Stock options | 100 to 2,000 shares |
| Restricted stock | 100 to 1,000 shares |

***Other benefits:*** **Company car (usually new car every two years). Club dues, assessments, and expenses fully paid. All medical and dental bills 100% reimbursed. Company paid financial advisory service. Savings Plan (Company normally contributes 20¢ to 50¢ for every $1.00 invested, plus interest).**

## Major corporations

**JOB TITLES**

| | |
|---|---|
| 1. Vp-marketing services | $55,000.—$125,000. |
| 2. Vp-advertising services | $40,000.—$ 90,000. |
| 3. Vp-corporate communications | $50,000.—$ 70,000. |
| 4. Media director | $40,000.—$ 80,000. |
| 5. Associate media manager | $30,000.—$ 50,000. |
| 6. Network negotiator | $30,000.—$ 50,000. |
| 7. Manager, spot buying | $20,000.—$ 40,000. |
| 8. Media planner/buyer | $14,000.—$ 20,000. |

**Compensation package applicable to those at v.p. title and above**

***Package includes:*** **Bonus (0 to 20% at all levels). Deferred compensation (discretionary). Management bonus (discretionary). Stock options (discretionary).**

***Other Benefits:*** **Tuition refund (depending upon corporation).**

Source: Survey by Simmy Suseman

**SALARIES** (from 65)

The economy has created an unusual aspect to the talent supply. It has put the spotlight on the most easily relocatable candidate as opposed to the best person.

Like it or not, the costs have escalated to the point where advertisers and agencies find the relocation costs almost unbearable. The candidates who are single, living in rental situations, are "snapped up." The family people unfortunately in many cases have been separated for several months as the professionals went to new job locations alone. The spouse stayed behind to sell a home, have children finish school terms. The new employer has to absorb such costs as multiple visiting trips, enormous risks of temporary living accomodations, bridge loans, mortgage differentials, moving vans, transporting automobiles and pets — anything to get that special person.

**New York's best trainees come from out-of-town**

As advertising has become more spread out and sophisticated due to many agency acquisitions throughout the country, we have advised many agencies to attempt to recruit trainees from their local colleges and invest in them. When the kids get hired, they may start at salaries higher than New York, but they do not endure the enormous high cost of living and the lower salaries in the advertising meccas. We have conducted a fascinating study and have found the following:

1) The youngsters who have grown up outside of New York are very open and less jaded.

2) Those who have trained outside of New York have the ability to bring a new dimension to their work at the agencies. They have generally had more diversified experience.

3) They bring a fresh, new approach to their job.

4) They have generally done very well in New York and have been promoted within the large New York structures.

5) The out of town salaries, at the entry level are generally 20% higher than New York.

All costs are outrageous! Network costs, spot expenditures, publication rates and people costs.

All are going in direct opposition to the economy.

In the most trite terms, "the sky's the limit!"

Where will it end? Who knows?

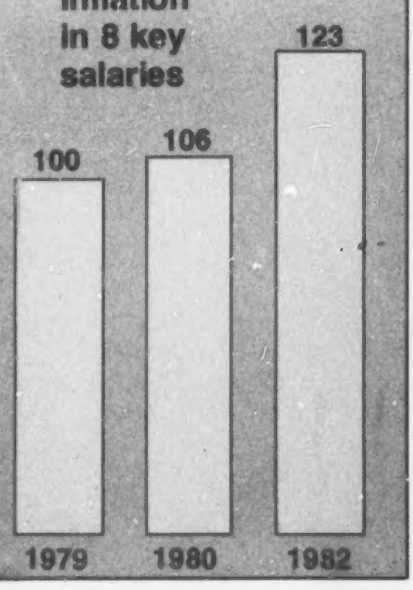
Once again, the laws of supply and demand are in force. So, don't skimp in attracting the newcomers. ■

**Simmy Sussman: "The buying services are a tremendous area for growth in a Downward economy."**

**Change in top salaries of 8 key media decision makers**

| | 1979 | 1980 | 1982 |
|---|---|---|---|
| **Major 4A's ad agencies** | | | |
| Sen vp-media director | $80,000 | $85,000 | $100,000 |
| Vp-assoc. media director | 45,000 | 55,000 | 65,000 |
| Media planner | 25,000 | 25,000 | 25,000 |
| Media buyer | 20,000 | 23,000 | 25,000 |
| **Major corporations** | | | |
| Vp-marketing services | $75,000 | $85,000 | $125,000 |
| Vp-advertising services | 60,000 | 60,000 | 90,000 |
| Media director | 65,000 | 60,000 | 80,000 |
| Network negotiator | 45,000 | 48,000 | 50,000 |

Source: Simmy Sussman Surveys






phasis on local market condition and bottler needs. It has been blessed as well by a creative campaign, featuring sun and surf scenes backed up by the Beach Boys pop song hit of over 15 years ago, "Good Vibrations." And, perhaps no less important, it features eye-catching orange and blue packaging that adds to its in-store visibility and consumer recognition.

Media expenditures for Sunkist have diminished since 1980, at least according to data from syndicated services. Of the $4.5 million reported for the brand last year, $4.2 million was in spot tv, and $114,000 in spot radio. Sunkist also uses the beverage industry trade publications, and in heavier doses than the competition, according to Larry Vodak, account supervisor at Foote Cone & Belding.

Some network television is being used this year, but President Mark Stevens has said he wants the introductory phase of the brand to be complete before Sunkist makes a major commitment to network. If brand growth continues, network tv will undoubtedly play a much larger role in the Sunkist media plan in 1983.

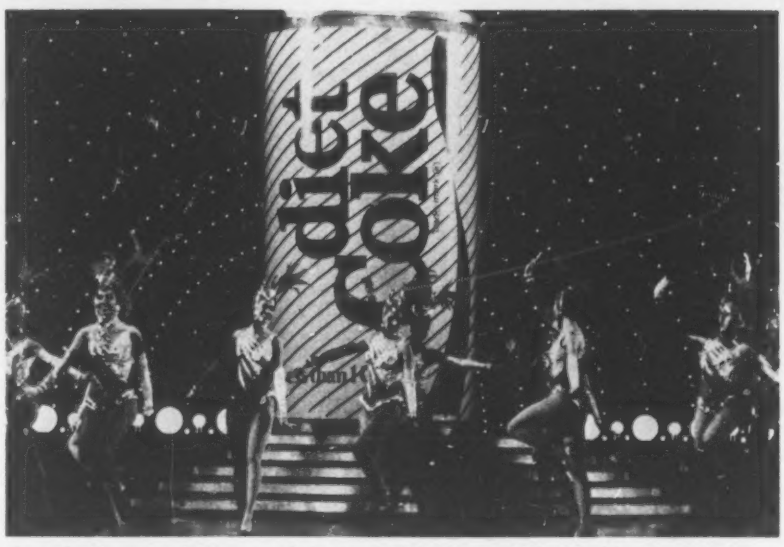
Sunkist is also playing a silent role in the caffeine controversy in the industry. Early this year, Sunkist quietly took the caffeine out of the product after extensive flavor testing. But, up to now, the removal of caffeine hasn't been made a copy point or product benefit for the brand. However, if the issue continues to develop, it is an ace up the sleeve for Sunkist in its marketing program.

### Orange Crush

Despite its popularity in Denver, Crush hasn't taken the country by storm since the brand was purchased by Procter and Gamble two years ago. After changing agencies, P&G's latest move has been to reformulate the product, but media and distribution have pretty much remained at their pre-P&G levels.

The media outlay last year was a modest $4.5 million, and as is consistent with the P&G media stance, 98% of that total was invested in television.

Crush could be a formidable competitor to Sunkist, if and when P&G determines how it is going to handle




**A rocketing sendoff was given to diet Coke at New York's Radio City Music Hall. The brand's new theme music was sung by jazz performer Bobby Short, and danced to by the Music Hall's Rockettes.**

bottler arrangements and distribution. But if inordinate effort is required for minimal returns, P&G may choose to dispose of its soft drink business, following the example set earlier this year by IT&T with its sale of C&C Cola to Shasta Beverages.

### Conclusions

Coca Cola's expansion of its product line in the low calorie line signals a new phase in the industry. While it may not trigger a rash of new low-cal product introductions, it will put greater attention on the segment and force a rethinking of strategies among primary competitors, particularly Diet Pepsi and Pepsi Light, Diet Rite from Royal Crown, and the Dr Pepper and Seven-Up sugar-free versions.

Expenditures for diet soft drinks have been in the $10 million to $15 million range. Diet Coke's sudden infusion of up to $50 million annually puts the established diet soda brands in a difficult position. In a battle for visibility, they will all be vastly overshadowed by the awesome media presence of diet Coke.

The diet Coke introduction will force expanded budgets for the competitors, raising the question of where the additional funds will come from. A shifting of funds from high calorie regular brands is the most likely response.

Further pressure for media funds is added by the introduction of caffeine-free colas, if test market results indicate the desirability of national roll-outs.

What these moves pressage for the soft drink business is greater product segmentation, brand extension, and greater marketing and advertising expense to maintain or build brand share. Greater segmentation places additional pressure on every brand to maintain facings on supermarket shelves. If caffeine proves to be an issue with consumers, it could push established national brands into offering caffeine-free versions as an economical alternative to rolling out new brands to carry the caffeine-free banner.

The caffeine question also hurls a new challenge to creative in soft drink advertising. For over a decade, soft drink advertisers have been able to disregard product attributes in copy and indulge in the artistic freedom granted by life style messages. Usage situation rather than the product itself became the paramount theme in soft drink advertising. Frolicking children and rambunctious puppy dogs, leaping graceful bodies in pursuit of a frisbee, blossoming romances and beach parties, for so long a part of soft drink marketing mythology, may be forced to give way to straight talk about what is or isn't in the product, and how the ingredients can affect how the user feels. *Fred Gardner*

media expert and a generalist.

That lightening fast hand attached to the desk top calculator belongs to an equally calculating mind. One that functions with the knowledge of:

- an assistant product manager: how does my product work? how is it manufactured? Why is it different and/or better?
- a sales manager: where are my sales coming from? where is the competition hurting us? which of my guys need help? who can I trust to handle their area with simple briefings and follow up? What can I do to enhance promotions and enhance the sales force?
- a psychiatrist: understanding what motivates prospects, what are they sensitive to?
- a researcher: having the analysis capabilities of Yankelovich or at least a Harvard Business School graduate.

With these areas to draw from, your planner must then practice the financial wizardry and bottom line respect of a chief financial officer, when developing the recommendation.

Granted, a lot of information comes from your account executive, but often it's the media department that digs out the sources that can be tapped.

Your product is not a cereal or a soap. It's not consumed by millions of people several times a year. There aren't the same volumes of research available to define and measure your market by units sold, dollar volume and competitive shares. There's no up-to-date central source that groups prospects by age, education, income, geography, leisure habits, purchasing influence and media consumption habits.

To get at this information, your planner has to dig for it. It comes from making thousands of phone calls, seeing hundreds of people, reading and saving articles and ads from publications in your industry, the advertisng industry, *The Wall Street Journal*, *Forbes* or maybe *People*.

Basically your planner is a pack rat, and those endless sheets of paper with quickly written notes are the ingredients used in developing a well thought out recipe for this year's communications plan. If you like it, you may want to ask to meet the chef. Bon Appetite! ■

**PLAYBOY:** In cautionary times, the best way to build share of market is by concentrating advertising in the largest, most efficient media. PLAYBOY is first among them.

In good times, you build your advertising programs in the same media to maximize profitability. Again, PLAYBOY is your basic buy.

The reason is simple. When you advertise in PLAYBOY, month after month, you reach almost 15 million men—men who buy an astounding one fourth of all spirits products. Men with a lust for life—and the means to live it well.

Which is why, good times or cautionary, the power of PLAYBOY is irrefutable.

**The Playboy reader. His lust is for life.**

Source: MRI, Spring 1982 (Aud.) & Fall 1981 (Prod./Mag.). © 1982 by Playboy.

**CABLE**
**by WATSON S. "JAY" JAMES,**
vp-video technology programing,
Doyle Dane Bernbach, Inc.

## Zapping overrated in cable

A cursory glance at The New York *Times*' "Advertising" column on August 12th could have left one with the impression that cable subscribers do more commercial "zapping" than their non-cable counterparts. The column said, "A" subscribers who have remote control devices are three times more likely than those without such devices to switch stations to avoid commercials. The article went on to say that "cable makes zapping more attractive."

While judgmentally that may be true, there was nothing in the S.R.I. study to support this conclusion. The S.R.I. study did not measure "zapping" in *non-cable* homes, so cable versus non-cable comparisons are not possible. The "three times greater zapping" referred to by The New York *Times* had to do with the presence or absence of remote control. For all we know, non-cable viewers with remote control do as much "zapping" as cable viewers with remote control. And what the column *didn't* say was that there were other factors that caused much higher levels of channel-switching than the desire to avoid commercials, for example "program preference on another channel." In fact, relative to these other reasons, the incidence of commercial "zapping" was quite small.

When asked, "When you, yourself, turn on the television set in the evening, do you usually stay turned to the same channel until you turn the set off, or do you sometimes switch to different channels," 82% of the sample indicated that they sometimes switched. For subscribers with remote control, the percentage was 86.9% are shown in the Box "A."

At least 59.2% of all cable subscribers who sometimes switch channels do so for programing reasons. By comparison, only 5.9% do so in order to avoid commercials. Since we don't have a non-cable sample for comparison, we can't say whether this percentage is greater or smaller than among broadcast-only viewers. For the same reason, although 12.9% of viewers with remote control cite "commercials" as a reason for channel-switching versus 3.7% of viewers without remote control, we don't know how this behavior differs in non-cable households.

The preceding question was open-ended, allowing respondents to supply their own reasons for switching chan-

### A: Reason for switching among cable subscribers

| | Presence of remote control | Absence of remote control | Total |
|---|---|---|---|
| "Program preference on another channel" | 49.9% | 62.1% | 59.2% |
| "Dislike/not interested in program" | 47.2% | 43.4% | 44.3% |
| "To see what is on" | 17.0% | 10.6% | 12.1% |
| "Commercial comes on" | 12.9% | 3.7% | 5.9% |

### B: Switch because a commercial comes on

| | Presence of remote control | Absence of remote control | Total |
|---|---|---|---|
| Often | 28.3% | 10.3% | 14.3% |
| Sometimes | 11.0% | 12.2% | 11.9% |
| Subtotal | 39.3% | 22.5% | 26.2% |
| Practically Never | 56.9% | 71.6% | 68.3% |
| Never | 1.7% | 1.4% | 1.5% |
| Subtotal | 58.6% | 73.0% | 69.8% |
| Don't know/no answer | 2.1% | 4.5% | 4.0% |

### C: Last time watched primetime tv, number of times switched channels

| | Presence of remote control | Absence of remote control | Total |
|---|---|---|---|
| 0 | 69.6% | 89.3% | 84.9% |
| 1-3 times | 12.9% | 6.3% | 7.7% |
| 4-6 times | 8.5% | 1.6% | 3.2% |
| 7+ times | 6.0% | 1.4% | 2.4% |
| Don't know/No answer | 2.9% | 1.5% | 1.8% |

nels. The entire sample was then prompted with a series of questions about various reasons for switching channels. When specifically asked whether they switched channels "because a commercial comes on", the results were as shown in Box B.

Here, again we don't know how this reported behavior differs in non-cable homes. And, as statistical research cautions, "the term 'commercial' tends automatically to elicit an emotionally-charged response; many people know that they are expected to dislike commercials." In other words, there may be a bias toward higher reporting of "zapping" with a direct prompt like "because a commercial comes on." Nevertheless, even with this leading question, 69.8% of adult cable subscribers said they never or practically never "zap" commercials.

As a way of getting at actual behavior rather than the more theoretical behavior reported above, SRI asked respondents about their channel-switching during the *last* time they watched primetime tv. Here, again, there was a direct prompt about commercials. People were asked about how many times they switched channels because a commercial came on during the *last* time they viewed television in the evening. Including as "0" those persons who reported they practically never switch because a commercial comes on, the results are shown in Box C.

The conclusion we must draw from this is that about 15% of cable subscribers "zap" commercials on a given evening. Only 2.4% reported frequent commercial "zapping" (7 plus times). The incidence is obviously greater in homes with remote control than those without it.

We must be aware of the limitations of any study of this type. Based on the SRI study, the extent of commercial "zapping" by cable subscribers does not seem inordinate.

**BUSINESS PRESS**
**by MARIE KACHINSKI**
media director,
Arnold & Company Inc., Boston.

## Better targeting begins at home

The need for reliable readership information in the trade press is repeated endlessly in any and all discussions. Seldom is the suggestion of proprietary research mentioned.

The burden of proof in our competitive world lies with the seller but the veracity of seller-supplied data is automatically questioned. It simply goes against the "show me" grain of American business to pay for research that would prove the worth or lack of same of another company.

Yet some simple probing would provide valuable information to enhance and protect the investment of advertising dollars to assure not only that a publication is received but that it fills a need and is recognized as doing so.

## Brand Report 80:

# Soft drinks

**After a down year in advertising, soft drink marketers came back strongly in 1982. Caffeine became an issue as Seven-Up and PepsiCo came out with caffeine-free colas. But industry leader, Coca-Cola, bet big on the diet Coke spin-off. For the first time in years, product benefit rather than life-style returned as a copy point.**

Caffeine, controversy and diet Coke.

Those are the factors that have marked the first three quarters of 1982 in the soft drink business.

It looked like a typical year at the start but in early March, Seven-Up took the industry by surprise as it unveiled a campaign that made the absence of caffeine a key point in the brand's product benefit description. At first, the rest of the industry scoffed and then gradually responded.

Seven-Up added steam to the controversy it was whipping up over caffeine in soft drinks by introducing a caffeine-free cola, Like. Royal Crown swiftly followed suit by expanding its diet RC 100, which was caffeine-free, into a regular caffeine-free cola. By mid-summer, Pepsi responded with a caffeine-free cola, Free, in eight test markets, with heavy media support.

A caffeine-free cola from Coca-Cola USA would mean the market is for real, but Coca-Cola went in a different direction. Rather, the company chose to expand on the trade mark franchise with the introduction of diet Coke.

All of that made for a summer of high drama in the soft drink business.

Naturally with all that activity, media expenditures climbed. Seven-Up began to win back some business, and Coca-Cola was hoping to eat

heavily into shares held by Diet Pepsi and Pepsi Light rather than take business away from its own low calorie share leader, Tab.

Dr Pepper, with its purchase of the Canada Dry brands from Norton Simon, Inc., last year, also showed increased sales momentum although media outlays remained about equal to previous totals.

Further consolidation in the soft drink business occurred when Shasta beverages acquired C&C Cola from International Telephone & Telegraph Co. in March. ITT had been rolling out C&C gradually on a state by state basis, developing each market before moving on to the next. The new campaign, which aired in August, attempts to give the brand flavor parity with Coke and Pepsi. The new spot tv campaign is running in New York and Los Angeles.

Soft drink expenditures tabulated by LNA/BAR for the six leading media showed that the industry total declined in 1981 for the first time in more than half a decade. Last year's total was $172,042,400 for regular carbonated soft drinks as compared with $190,888,700 in 1980.

The retrenchment was in part due to the poor economy. In tough times the industry generally shifts funds from advertising to take up the slack created by price discounting to stimulate sales. This year the trend is back to heavier advertising schedules; price discounting is less a factor than it was a year ago.

But ironically, while spending was going down, consumption of soft drinks rose 2.8% in 1981. Moveover, per capita consumption rose to a new high of 37.5 gallons last year, from 27 gallons in 1970, according to beverage industry analyst John Stacy.

Coca-Cola and Pepsi Cola continue to dominate the marketplace as brands and companies. Both posted case sales gains, while the number three and four brands, Dr Pepper and Seven-Up, both showed case sale declines in 1981. But both, with just under five percent of the market, are not even within hailing distance of the second place position.

Coca-Cola USA and PepsiCo, between them with their consortium of brands, hold close to 60% of the U.S. carbonated soft drink market. And, as can be expected, the two soft drink giants dominate the industry in media investments.

Coca-Cola USA's combined share can be expected to climb this year and next as diet Coke rolls out, while the effect of PepsiCo's caffeine free cola on the company's share is not likely to be immediately dramatic.

At the bottom end of the top 10 brands, Sunkist continues its strong performance, ending 1981 with a 1.7% share, with 2% a likely accomplishment before the end of 1982.

## Soft drink market 1981 media expenditures (in thousands of dollars)

| Brand | Total | Magazines | Network tv | Spot tv | Net radio | Spot radio | Outdoor | Newspapers |
|---|---|---|---|---|---|---|---|---|
| Coca-Cola | 45,730,100 | 215,100 | 15,202,700 | 30,446,100 | — | 6,231,400 | 2,547,800 | 1,087,000 |
| Sprite | 11,972,300 | — | 6,640,000 | 4,694,700 | — | 451,500 | 186,100 | — |
| Tab | 15,488,700 | — | 7,422,600 | 7,702,800 | — | 310,800 | 52,500 | — |
| Canada Dry | 10,729,600 | 1,241,800 | 3,706,100 | 4,675,100 | — | 913,600 | 29,400 | 163,900 |
| Dr Pepper | 11,435,900 | — | 7,428,000 | 2,158,800 | — | 1,455,100 | 116,200 | 277,700 |
| Pepsi-Cola | 31,199,500 | — | 4,447,600 | 18,470,300 | — | 6,871,600 | 729,000 | 671,100 |
| Mountain Dew | 12,992,400 | — | 2,896,200 | 7,947,100 | — | 2,112,500 | 36,100 | — |
| Diet Pepsi | 13,783,700 | 221,500 | 5,681,400 | 6,186,100 | — | 1,659,600 | 35,100 | — |
| Pepsi Lite | 5,133,200 | — | — | 5,057,700 | — | 65,299 | 10,300 | — |
| Seven-Up | 27,505,000 | 315,400 | 18,444,000 | 2,995,700 | — | 2,971,200 | 1,895,900 | 922,400 |
| Diet 7-Up | 8,046,300 | 974,100 | 5,242,900 | 932,700 | — | 896,000 | — | — |
| RC 100 | 4,336,300 | — | — | 3,404,200 | — | 22,000 | — | 10,100 |
| Diet Rite | 5,119,600 | 192,300 | — | 4,902,100 | — | 25,200 | — | — |
| Sunkist | 4,439,600 | — | — | 4,174,100 | — | 114,000 | 86,800 | 64,700 |
| Crush | 3,084,800 | — | 25,700 | 3,054,700 | — | — | 5,200 | — |
| A&W | 5,432,700 | — | 2,210,000 | 1,036,100 | 1,285,200 | 832,600 | — | 77,200 |

Source: Leading National Advertisers, Broadcast Advertising Reports, Radio Expenditure Reports, Media Records

In media selection, spot television continues to be the darling of the industry. The $20 million decline in expenditures came almost entirely out of network television, which fell from $80.8 million in 1980 to $61.8 million last year. Spot tv slipped about 2%, from $102.3 million, to $100 million.

Pepsi Cola was the brand most responsible for the decline in network spending, as last year it cut its network investment from $20.5 million to $4.4 million. PepsiCo spokesman says network television spending has not declined and that LNA is in error. Other heavy users of network only trimmed net budgets slightly, Coca-Cola by about $1.5 million, and Seven-Up by $1.9 million, while maintaining spending levels above $15 million.

Here's how the soft drink leaders are advertising and marketing in the last half of 1982:

**Mike Weinstein, vp marketing, A & W Beverages, uses network radio as a national base for a media program that includes network and spot tv.**

### Coca-Cola

The share leader of the industry continues to increase sales and dominate with ad expenditures. Individual bottlers still criticise Coca-Cola USA for past inflexibility, but are complimentary of chairman Roberto Goizuetta, company president Don Keough, and Coke USA president Brian Dyson.

The fact that in its advertising Coca-Cola USA has not responded to the Pepsi challenge campaign in local markets has been a bone of contention between bottlers and the parent company. Some bottlers believe the effect of the Pepsi challenge will simply dissipate with time. Jack Lupton, president of JTL Corp., the Coke bottler in Chattanooga, Tenn., recently commented, "I think the Pepsi Challenge will eventually neutralize itself. We're beginning to see signs of it already in Dallas. New Coca-Cola management has created an air of excitement that didn't previously exist," Lupton said.

Coke's newest campaign theme, the essence of simplicity, proclaims "Coke is it," accompanied in television 30 second spots by music and the expected life style situations.

Coke's television budget increased slightly last year, to $35,648,800 from $34,300,800 in 1981. The distribution differed, as the spot tv allocation climbed from $17 million to $20 million, and the network tv budget slipped from $16 million to $15 million. This indicates a heavier emphasis on local market conditions.

Coca-Cola continued its strong use of spot radio last year — $5.2 million — second largest outlay in the industry, and ventured into network radio with long form sponsorship of rock concerts on ABC and NBC's *The Source*. Unfortunately, these expenditures were missed by BAR in 1981.

This year, Coca-Cola is continuing its rock music sponsorship exclusively with the ABC Rock networks. Stacey Lippman, who was vp-associate media director at McCann-Erickson, Coke's agency, commented earlier, "Our post buy analysis shows that rock music and not television is the primary medium for young people. They just don't go to tv for the kind of involvement and fantasy they get with rock music. It's not just a cpm buy."

This year, Coca-Cola USA is buying 16 concerts on the ABC Rock Network, 10 going to the Coke brand, and six to Mellow Yellow. ABC has been able to break out audience data on a bottler area basis, and in some instances, Coca-Cola USA has been using reverse co-op, billing the rock sponsorship buy back against local bottlers, according to Lou Severen, at ABC Radio. He added that initially, the money for the rock concert buy was taken out of the network tv budget.

First quarter reports this year suggest that spending of the brand is remaining constant, but that was before the introduction of diet Coke. 1983 expenditures for diet Coke, president Brian Dyson has said, will run at about $50 million.

This year's outlay in the New York/New England market for the last five months of the year will run close to $10 million, with a spot tv blitz. National distribution is expected to be complete by mid-1983.

As distribution becomes national, media for diet Coke will expand. Rudy Bechtel, account supervisor at SSC&B said, "We'll be using print, radio, outdoor, everything. After all, this is a Coca-Cola product."

Diet Coke is positioned more as an extension of Coca-Cola than a hard core diet drink. The commercials are definitely not advertisements for anorexia nervosa or swim suit shape-ups.

While Coca-Cola USA won't say, the question is how much of the diet Coke budget comes out of the Coca-Cola regular budget. If the $50 million is a fresh infusion of money, it will bring the Coca-Cola brand budget to over $100 million, a Mt. Everest high in soft drink media expenditures.

Other Coca-Cola brands in the diet and rainbow flavor categories are supported at levels consistent with the competition. Tab led the field with $15,488,700. Network tv got $7.4 million, and spot tv $7.7 million.

Sprite, Coke's lemon/lime entry was backed by $11,972,300 in media, with a strong emphasis on network tv. A heavier presence there is necessitated by Seven-Up's strong commitment to network. But in spot tv, Sprite investments nearly doubled Seven-Up's expenditures.

### Pepsi Cola

In its contest with Coca-Cola, Pepsi is generally granted to have won the battle for supermarket sales. But in vending machine and bulk syrup business, Pepsi still runs second to Coca-Cola.

And where Coca-Cola chose to bring out a brand extension, this year Pepsi took a leap into the unknown with its introduction of a caffeineless cola called Free. Whether there is a real market for a caffeine-free cola has yet to be determined.

Free has been launched in 11 test markets, Seattle, Spokane, Anchorage, San Diego, Phoenix, Los Angeles, Omaha, Oklahoma City, Milwaukee, Rochester, and Columbia, S.C.

PepsiCo announced that the product would be backed in its introduction with the equivalent of a $100 million national annual budget. This translates into very heavy local advertising levels in test markets. Media include spot tv, for which three 30 second spots were developed, a 60 second introductory radio spot, free standing inserts and coupon bearing print ads.

Rebecca Goeke, pr director at Pepsi, said that initial response to the product was strong, but it was too early to determine if it was consumer reaction or just enthusiasm at the trade level.

For the flagship brand, Pepsi Cola, there has been a gradual shift over to local media as the company has invested increasingly more money in this Pepsi Challenge campaign. Ms. Goeke said that the challenge campaign is now running in 80% of the country. As a consequence of this, "there has been a considerable shift to local media because the Challenge campaign is a local market activity. Consequently, spot expenditures are up. Network expenditures haven't gone down."

LNA/BAR shows a sharp decline in network expenditures which Pepsi says is incorrect.

Pepsi is finding that the Challenge campaign, started six years ago, has a long life indeed, and that so far there is no particular point in time where it automatically gets retired. "The taste platform has been good for us, and as long as we keep on winning at sampling booths, we'll continue with the Challenge campaign in the marketplace."

### Seven-Up

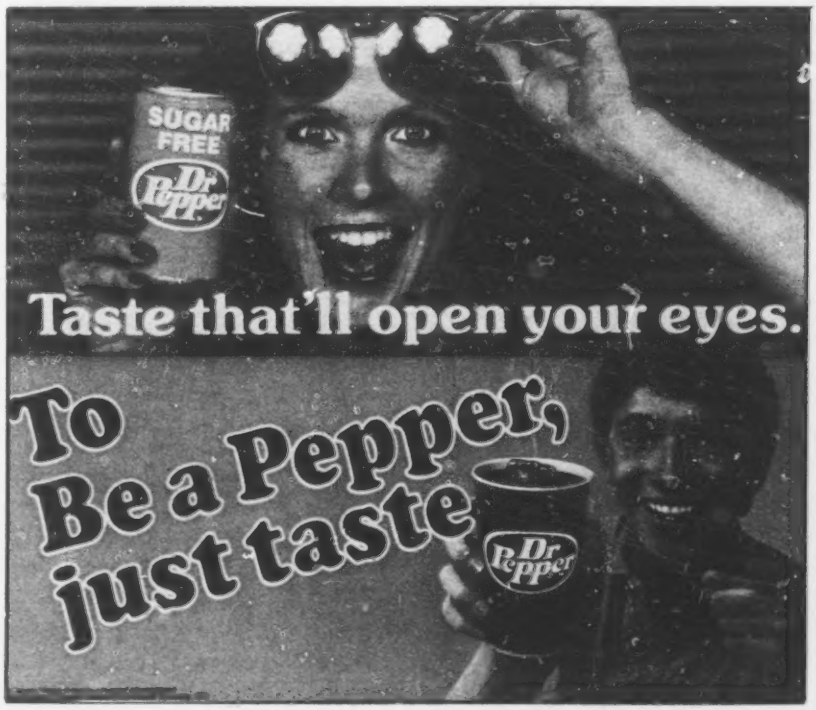
After three years trying to reestablish Seven-Up in the mainstream of soft drink advertising and consumption with its life style "Feeling Seven-Up" campaign, the Philip Morris-owned company took a stab in a different direction this year. In early March, Seven-Up launched its "caffeine-free, never had it" campaign, which made caffeine content an issue in the soft drink industry.

Earlier campaigns had established the Seven-Up image as the "uncola," and kept the brand in the number three spot in the business. But with its successor campaign, "feeling Seven-Up," the brand lost momentum and slipped back to fourth spot, edged out by Dr Pepper, despite a media budget that is triple Dr Pepper's.

The new campaign is apparently working, as the brand has posted sales gains of 5% since its inception.

Further changes in positioning and creative have displaced the array of sports stars in Seven-Up commercials and brought back the Trinidad actor and dancer Geoffrey Holder, who in previous years unzipped the uncola can with such aplomb.

Only recently have company officials conceded that the brand's uncola image was the most distinctive one it has had in the last 10 years. But since deciding to run with the no caffeine theme, Seven-Up appears on the road to a surer identity and stronger image.




Dr Pepper uses colorful outdoor postings in sunbelt locations to visually reinforce the tv and radio theme, "Be a Pepper." Dr Pepper outdoor expenditure in outdoor is the fourth largest among soft drink advertisers with national budgets.

A MOVING EXPERIENCE.
Feature-priced Sunkist really moves.
Every time you feature-price Sunkist you generate more trial. Trial that's made Sunkist Orange Soda the fastest growing soft drink in America.
And we're going to keep on growing, because 80% of those who try us come back for more.
So when you feature-price Sunkist, you're not just selling extra cases, you're building long-term customers. And that's a very moving experience.

Sunkist and Coca Cola both use strong campaigns in beverage trade magazines to reach wholesalers.

The company's caffeine-free cola, Like, was introduced in early Summer in eight markets: San Diego, St. Louis, Norfolk, Albuquerque, Dayton, Phoenix, Madison and Rochester. A ninth market, Detroit, was added last month.

Media for Like include spot tv, newspapers, regional magazines and outdoor.

Seven-Up company is unwilling to discuss media weights in its test markets, but considering the weight Pepsi Cola entered with for Free, expenditures are probably comparable. The spending level for the flagship brand suggest that the company would go for a substantial effort for a new product.

A company spokesman said Like is "exceeding our expectations, which were reasonable."

1982 appears to be a turnaround year for Seven-Up as it goes back to its roots, being un-cola and un-caffeine.

### Dr Pepper

Long a one flavor operation, Dr Pepper broadened its potential scope in the soft drink business with the acquisition of Welch's, and the Canada Dry brand from Norton Simon Inc. With that move, Dr Pepper became a flavor house. And fortunately, there is little if any cannibalization or competition likely to develop between the three brand lines.

Dr Pepper's rise to third position in sales was largely the result of being able to shed a regional flavor image and make a more national appeal. The most recent and long running campaign for the brand, "Be a Pepper," established a strong image for the brand with the under 25 demographic. A further measure of the campaign's effectiveness is how well it has done without overwhelming media presence, a 3.5% market share with a budget under $12 million.

This year, Dr Pepper's agency, Young & Rubicam, developed a new set of lyrics for the campaign theme song and new graphics for billboards. The company also increased its co-op support program.

At the annual bottler convention, chairman of the board W. W. Clements stated, "To build a successful and growing franchise for Dr Pepper, effective and continuous consumer advertising is a must. We know that national network advertising, while important, can't do the job alone. It must be supported and strengthened by strong and continuous local media that is right for your market."

John R. Albers, senior vp, marketing, told bottlers, "in 1982, we will greatly increase the dollars for co-op local media. We will more than double the 1981 level. This will provide more total media dollars than ever for the brand."

Dr Pepper's management took a look at supermarket food ads and found the brand has gotten short shrift in this area. This is partly due to the fact that only 37% of the brand's sales comes from supermarkets, as compared with 58% average for the industry.

Thomas Kalahar, executive vp, marketing operations, commented, "One fact emerges from studying an analysis of grocery trade ads. Major cola brands, lemon lime brands, and

Seven-Up launched its caffeine free cola, Like, with spot tv, spot radio and regional print in selected test markets, with strong anti-caffeine message.

# You don't need caffeine

**Caffeine is a stimulant.**

Recently, questions have been raised about caffeine. In fact, The Food and Drug Administration has proposed that caffeine be dropped from its list of substances that are generally recognized as safe. Although further research is needed before any final conclusions can be drawn, the fact remains that caffeine is a stimulant that people don't need.

**You may be consuming more caffeine than you realize.**

Most people are aware that caffeine is present in coffee and tea. But people are generally surprised to learn that caffeine is added to many popular soft drinks, including the leading colas. In fact, almost all of the caffeine in the leading colas is added caffeine. The result is, you may be consuming more caffeine than you realize.

**Where does the added caffeine in colas come from?**

The caffeine added to the leading colas is a by-product of manufacturing decaffeinated coffee. That's right, the same caffeine that is being removed from coffee is being added to the leading colas. The Seven-Up Company has created a completely new cola, with no added caffeine.

**Introducing Like. 99% Caffeine-Free cola.**

New *Like* is 99% Caffeine-Free compared to the leading colas. The only caffeine in *Like* is a trace amount found in its natural flavors. *Like* gets its excitement from its full, rich cola taste.

**Judge for yourself.**

Now there is a great tasting cola with no added caffeine. Try new *Like*. Prove to yourself that you don't need caffeine, and neither does your cola.

New from The Seven-Up Company.

**You don't need caffeine**
**And neither does your cola**

even the flavors get a share of features ad support about equal to their share of market. But Dr Pepper's share of ads is less than its share of sales in all but a few markets." Kalahar believes the local bottlers must sell harder to the grocery trade to redress the balance.

And the problem of shelf space was also addressed by vp consumer marketing, William Schemmerhorn. Dr Pepper has placed highly in the Video Storyboard study that asks, "What is your favorite television commercial?" In 1981, Dr Pepper placed second, ahead of every other soft drink and second only to Miller Lite beer.

Schemmerhorn then asked, "If Dr Pepper's advertising is so great, why aren't sales any better?" Pricing, shelf space and bottle size were found to be the factors that had a depressing effect on sales, he said.

### A&W

United Brands' A&W brand has gradually become one of the heavier spenders among second-tier soft drinks. Last year's expenditures were in the $6 million range, and the budget for 1982 will run close to $10 million, according to vp of marketing Mike Weinstein.

A&W has been the media maverick of the industry, the first to revive the use of network radio. A&W was able to make that move because it places all the brand's advertising and doesn't provide co-op allowances for local bottlers. The bottlers occasionally become disgruntled over the network buy, which may come in on the second or third rated station in a given market. "From the local bottler point of view, we may seem to be coming in on the wrong station, but from our point of view we think we're doing a better job this way. We also supplement in a local market with spot radio where we have a low rated network affiliate," Weinstein said.

"Network radio is an efficient vehicle for us to reach our target audience. We get into a lot of markets at a low cost. This year, we're using five networks, including NBC's The Source and ABC in a scatter plan buy. We're not sponsoring rock concerts this year. So network radio is our national advertising base."

Weinstein said, "We also use a significant amount of network and spot television, and there we do a lot of flighting."

Theme for A&W this year is "Get that frosty mug sensation," which is used in radio and television.

Print is confined "to newspapers as a coupon delivery vehicle and on an opportunity basis," Weinstein said. "We're not using any other print."

With its scatter plan buy of network radio, A&W gets dominance in a medium at minimum cost because other soft drink marketers are only now beginning to give it serious consideration.

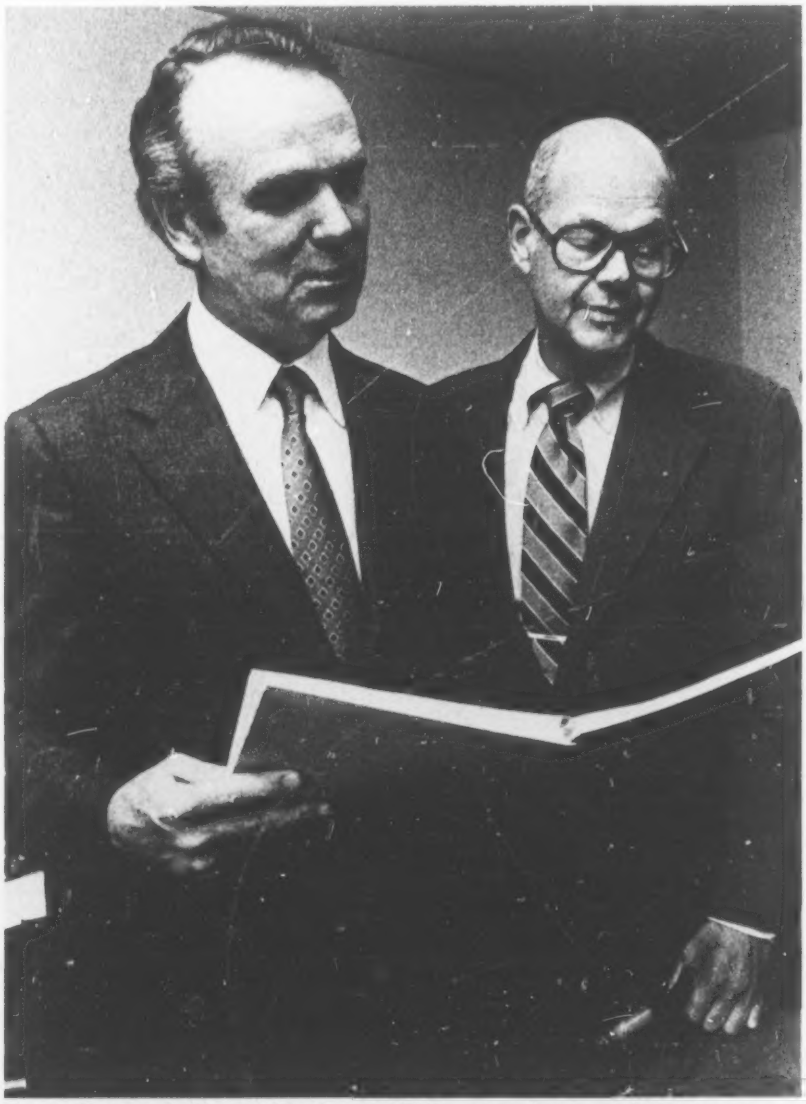
### Sunkist

The surprising upstart of the industry continues its three year pattern of success. Last year it made the top 10 in sales with a 1.7% share, and is pressing ahead toward a 2% share by year's end.

Sunkist is a brand that has been established by spot tv, with primary em-

# SMRB: fewer readers per copy

**The 1982 Study of Media and Markets reports lower readers per copy figures over-all for consumer magazines, but the pass-along audiences reported vary from almost nine times the original recipients to less than double.**



Frank Stanton (left), president, and Ed Barz, senior vp of SMRB are undaunted by controversies that sweep field of audience research.

First punches were thrown in the annual fall magazine audience research roughhouse last month. Simmons Market Research Bureau (SMRB) was first out with its total audience figures. Mediamark Research, Inc. (MRI) is due out with its versions of THE TRUTH about total audiences, pass-along multiples, demographics and all the rest of it shortly after this issue goes to press.

Frank Stanton and Ed Barz of SMRB got in the ring ahead of Timothy Joyce and Alain Tessier of MRI. And Stanton and Barz made the most of the opportunity to establish the validity of their new data. They pointed out that the 1982 Study of Media and Markets is designed to match the criteria for research of this kind handed down last year by the 4A's as follows:

- **Measurement** of over 100 magazines; Simmons measures 108.
- **Use of "issue-specific"** method on all magazines measured.
- **Recognition of editorial content** by respondents as proof of readership; Simmons shows them the cover of an issue, plus up to nine articles.
- **Larger sample size;** Simmons sample is 19,000 adults, was previously 15,000 — number of interviews now 35,000, was 27,000.

The data is so voluminous that it will be published in 43 volumes, with cross-tabs available through the time-sharing data processing centers — and

# Magazine total adults in 1982 Simmons

| | Average circulation | Readers per copy | Total audience |
|---|---|---|---|
| Barron's | 266,000 | 3.28 | 874,000 |
| Better Homes & Gardens | 8,053,000 | 2.61 | 21,045,000 |
| Bon Appetit | 1,261,000 | 2.37 | 2,987,000 |
| Business Week | 775,000 | 5.39 | 4,173,000 |
| Car & Driver | 686,000 | 3.88 | 2,658,000 |
| CBS Mag. Ntwk (net) | 1,629,000 | 3.65 | 5,946,000 |
| CBS Mag. Ntwk (gross) | 1,629,000 | 4.21 | 6,865,000 |
| Changing Times | 1,479,000 | 1.85 | 2,741,000 |
| Conde Nast Pkg. (net) | 5,174,000 | 2.33 | 12,039,000 |
| Conde Nast Pkg. (gross) | 5,174,000 | 3.22 | 16,653,000 |
| Cosmopolitan | 2,586,000 | 3.71 | 9,596,000 |
| Country Living | 658,000 | 2.82 | 1,854,000 |
| Cuisine | 754,000 | 2.29 | 1,726,000 |
| Cycle World | 331,000 | 6.72 | 2,228,000 |
| Decorating & Craft Ideas | 734,000 | 3.28 | 2,410,000 |
| Dec. & Craft/So. Living (net) | 2,800,000 | 2.53 | 7,085,000 |
| Dec. & Craft/So. Living (gross) | 2,800,000 | 2.63 | 7,366,000 |
| Discover | 808,000 | 2.01 | 1,674,000 |
| Ebony | 1,251,000 | 5.48 | 6,851,000 |
| Esquire | 672,000 | 3.49 | 2,345,000 |
| Essence | 693,000 | 3.89 | 2,697,000 |
| Family Circle | 6,911,000 | 2.61 | 18,033,000 |
| Family Handyman | 1,114,000 | 2.81 | 3,134,000 |
| Family Weekly | 12,305,000 | 2.07 | 25,520,000 |
| Field & Stream | 2,036,000 | 3.94 | 8,023,000 |
| Forbes | 733,000 | 2.89 | 2,123,000 |
| Fortune | 616,000 | 4.33 | 2,666,000 |
| Gentlemen's Quart. | 477,000 | 4.39 | 2,093,000 |
| Glamour | 1,934,000 | 3.00 | 5,754,000 |
| Golf Digest | 979,000 | 2.20 | 2,157,000 |
| Golf Dig./Tennis (net) | 1,437,000 | 2.22 | 3,195,000 |
| Golf Dig./Tennis (gross) | 1,437,000 | 2.25 | 3,228,000 |
| Golf Magazine | 692,000 | 2.65 | 1,833,000 |
| Golf Mag./Ski (net) | 1,077,000 | 3.36 | 3,621,000 |
| Golf Mag./Ski (gross) | 1,077,000 | 3.46 | 3,727,000 |
| Good Housekeeping | 5,115,000 | 3.47 | 17,765,000 |
| Harper's Bazaar | 634,000 | 4.97 | 3,150,000 |
| Health | 863,000 | 2.69 | 2,321,000 |
| Hearst Mag. Corp. (net) | 17,164,000 | 2.40 | 41,275,000 |
| Hearst Mag. Corp. (gross) | 17,164,000 | 3.40 | 58,306,000 |
| Hearst Men's Pkg. (net) | 2,554,000 | 3.89 | 9,944,000 |
| Heart Men's Pkg. (gross) | 2,554,000 | 4.30 | 10,977,000 |
| House Beautiful | 855,000 | 5.25 | 4,492,000 |
| Industry Week | 299,000 | 2.39 | 714,000 |
| Inside Sports | 547,000 | 6.02 | 3,292,000 |
| Jet | 670,000 | 9.04 | 6,057,000 |
| Ladies Home Jrnl. | 5,284,000 | 2.64 | 13,961,000 |
| LHJ/Fam. Grp. (net) | 7,290,000 | 2.39 | 17,441,000 |
| LHJ/Fam. Grp. (gross) | 7,290,000 | 2.61 | 19,054,000 |
| Life | 1,347,000 | 6.98 | 9,402,000 |
| L.A. Times Home Mag. | 1,318,000 | 2.20 | 2,893,000 |
| Mademoiselle | 1,102,000 | 3.35 | 3,690,000 |
| McCall's | 6,373,000 | 2.38 | 15,142,000 |
| Mechanix Illust. | 1,607,000 | 2.90 | 4,661,000 |
| Metropolitan Home | 737,000 | 1.52 | 1,120,000 |
| Money | 1,090,000 | 3.34 | 3,646,000 |
| Monthly Mag. Food & Wine | 356,000 | 2.16 | 769,000 |
| Ms. | 472,000 | 2.77 | 1,306,000 |
| National Enquirer | 4,516,000 | 3.46 | 15,623,000 |
| National Geographic | 8,555,000 | 2.40 | 20,566,000 |
| Natl. Supp. Pkg. (net) | 52,581,000 | 1.87 | 98,145,000 |
| Natl. Supp. Pkg. (gross) | 52,581,000 | 2.10 | 110,281,000 |
| Natuial History | 463,000 | 2.41 | 1,116,000 |
| Newsweek | 2,987,000 | 5.47 | 16,345,000 |
| New York (incl. Cue) | 440,000 | 2.72 | 1,198,000 |
| N.Y. Times Daily | 922,000 | 3.25 | 3,035,000 |
| N.Y. Times Magazine | 1,499,000 | 2.63 | 3,944,000 |
| New Yorker | 480,000 | 4.88 | 2,344,000 |
| Omni | 622,000 | 4.56 | 2,833,000 |
| 1001 Home Ideas | 1,144,000 | 2.42 | 2,772,000 |
| Organic Gardening | 1,286,000 | 2.76 | 2,911,000 |
| Oui | 551,000 | 3.10 | 1,705,000 |
| Outdoor Life | 1,486,000 | 3.40 | 5,047,000 |
| Parade | 22,008,000 | 1.98 | 43,573,000 |
| Parents | 1,635,000 | 2.41 | 3,938,000 |
| Penthouse | 3,317,000 | 1.95 | 6,587,000 |
| People | 2,349,000 | 8.76 | 19,403,000 |
| Playboy | 4,471,000 | 2.45 | 11,134,000 |
| Popular Hot Rodding | 241,000 | 9.86 | 2,373,000 |
| Popular Mechanics | 1,543,000 | 4.02 | 6,197,000 |
| Popular Science | 1,653,000 | 2.77 | 4,585,000 |
| Prevention | 2,419,000 | 1.70 | 4,114,000 |
| Psychology Today | AUDIENCE DATA NOT SHOWN CHANGE IN RATE BASE | | |
| Reader's Digest | 18,517,000 | 2.11 | 39,066,000 |
| Redbook | 4,334,000 | 2.00 | 8,679,000 |
| Road & Track | 588,000 | 4.53 | 2,666,000 |
| Rolling Stone | 736,000 | 5.47 | 4,021,000 |
| Runner's World | 331,000 | 2.98 | 986,000 |
| Sat. Eve. Post | 607,000 | 3.64 | 2,209,000 |
| Science Digest | 479,000 | 2.69 | 1,291,000 |
| Science 82 | 754,000 | 1.92 | 1,451,000 |
| Scientific American | 567,000 | 3.35 | 1,883,000 |
| Self | 1,023,000 | 2.26 | 2,310,000 |
| Seventeen | 1,384,000 | 2.25 | 3,110,000 |
| Ski | 385,000 | 4.97 | 1,894,000 |
| Smithsonian | 1,955,000 | 2.31 | 4,520,000 |
| Soap Opera Dig. | 582,000 | 5.79 | 3,372,000 |
| Southern Living | 2,065,000 | 2.40 | 4,956,000 |
| Sport | 939,000 | 3.98 | 3,734,000 |
| The Sporting News | 465,000 | 3.97 | 1,848,000 |
| Sports Afield | 532,000 | 6.56 | 3,489,000 |
| Sports Illustrated | 2,419,000 | 5.48 | 13,248,000 |
| Star | 3,385,000 | 3.06 | 10,348,000 |
| Sunday (net) | 22,723,000 | 2.09 | 47,382,000 |
| Sunday (gross) | 22,723,000 | 2.17 | 49,300,000 |
| Sunset | 1,408,000 | 2.46 | 3,464,000 |
| Tennis | 457,000 | 2.34 | 1,071,000 |
| Time | 4,561,000 | 4.54 | 20,699,000 |
| Town & Country | 296,000 | 4.07 | 1,203,000 |
| Travel & Leisure | 899,000 | 2.07 | 1,863,000 |
| True Story | 1,446,000 | 2.58 | 3,732,000 |
| TV Guide | 17,782,000 | 2.04 | 36,334,000 |
| US | 1,022,000 | 3.50 | 3,582,000 |
| U.S. News & World Rep. | 2,109,000 | 4.39 | 9,259,000 |
| Vogue | 1,115,000 | 4.36 | 4,858,000 |
| Wall St. Journal | 2,035,000 | 3.09 | 6,291,000 |
| Woman's Day | 6,705,000 | 2.36 | 15,825,000 |
| Working Mother | 371,000 | 2.36 | 875,000 |
| Working Woman | 487,000 | 2.23 | 1,088,000 |
| World Tennis | 365,000 | 1.68 | 614,000 |
| Ziff-Davis Mag. Net. (net) | 3,319,000 | 2.94 | 9,767,000 |
| Ziff-Davis Mag. Net (gross) | 3,319,000 | 3.66 | 12,156,000 |

making use of three databases: Clusterplus (Donnelley Marketing's 72 million household compendium); PRIZM (the Claritas geo-demographic market segments); and VALS (SRI International's value/lifestyle segments).

The most used volume put out by SMRB, however, will probably be a one-fold pocketpiece giving total audience and readers per copy for all adults, men and women for each of the magazines, except one. The exception is *Psychology Today*, for which audience data is not shown because of change in rate base circulation. The key figure is readers per copy for each book, the basis for extending average circulation to total audience. When MRI's readers per copy figures come out, the in-fighting between magazine will heat up, with research services trying to keep out of the line of fire.

Also measured by SMRB were audiences for tv (based on two-week diaries, plus a roster of special events); newspapers (reports of "read yesterday"); radio (based on "yesterday listening"); outdoor (collected in a map recall questionnaire); Yellow Pages (collected along with product information in terms of "do you use"); cable and pay tv (also based on product information about "cable subscriptions").

The product information that is available for cross-tabing with the media data is more voluminous than ever. It covers 750 product and service categories and 3,500 individual brands. Added this year are 41 categories and 270 brands.

Individual respondents are described by 24 demographics (age, sex, occupation, race, presence of children, etc.) 20 psychographics (amiable, self-assured, stubborn, etc.); and 10 buying styles (cautious, impulsive).

The sample is a national probability configuration of 19,000 households in all continental U.S. states — oversampled in high-income households, then weighted to reflect the true U.S. cross-section. The magazine and newspaper data comes out of 35,000 individual interviews in these households. The product data comes from 15,000 self-administered questionnaires. The broadcast data comes from 8,000 interviews and two-week diaries of personal viewing.

Multiple issue readership of magazines is developed by re-interviewing the same respondents after a four-week lapse. Radio and newspaper times are secured via two interviews.

Household recovery rate is approximately 75%.

Frank Stanton, president of SMRB, reports that many clients requested comparisons of audience estimates from the new study compared directly with those of prior years. So he issued a special report covering the questions asked most frequently at the same time he released the 1982 study. The users of the research were apparently most concerned about the change in methodology in measurement of some of the books, a subject that was considered highly controversial last year.

In 1981, 39 of the magazines that were measured by the through-the-book technique this year were measured by calibrated frequency. ■

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